

Opening Practice Checklist

Action Item	Responsible Person	Comments
Contact accountant and/or attorney		
Legal Entity		
Governance		
<ul style="list-style-type: none"> ▪ Employment Contracts/Buy-Sell Agreements 		
Organizational Table		
Mission/Goals		
By-Laws/Partnership Agreements		
Legal/Banking		
Attorney		
Accountant		
Bank:		
<ul style="list-style-type: none"> ▪ Bank Accounts 		
<ul style="list-style-type: none"> ▪ Line of Credit 		
<ul style="list-style-type: none"> ▪ Lock Box 		
<ul style="list-style-type: none"> ▪ Credit Card Processor 		
Insurance Agent		
Pension Adviser		
Federal Tax ID Number		
Licenses/Dues		
Curriculum Vitae		
State Medical License		
DEA		
Professional Societies		
Hospital Privileges		

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Action Item	Responsible Person	Comments
Telephone/Fax		
Telephone System		
Fax Machines		
Telephone Numbers		
Answering Service		
Cell Phones		
Physician Issues		
Vacation		
Sick Time		
Continuing Education		
Call Coverage		
Changing Schedules		
Sharing Employees		
Spouse Involvement		
Children Working		
Expenses:		
Continuing Education		
Travel		
Entertainment		
Membership to Clubs		
Tickets to Sporting, Social, and Civic Events		
Charitable Donations		
Team Sponsorships		

Action Item	Responsible Person	Comments
Insurances		
Medical Malpractice		
Health/Dental		
Life		
Disability		
Worker's Comp		
Property		
General Liability		
Business Interruption		
Keyperson		
Employee Theft		
Cyberliability		
Facility		
Locate Office Space		
Negotiate Lease/Purchase		
Design Space		
Furniture		
Medical Equipment		
Signage:		
<ul style="list-style-type: none"> ▪ Office Hours 		
<ul style="list-style-type: none"> ▪ Provider Names & Types of Licenses 		
Utilities		
Grounds		
Garbage		
Medical Waste		
Housekeeping		

Action Item		Responsible Person	Comments
	Maintenance		
	Pest Control		
Compliance			
	OSHA Manual and Officer/Employee Training		
	HIPAA Manual and Officer/Employee Training		
	Practice Policy and Procedure Manual		
	Section 1557 Non-Discrimination Training		
	Voluntary Compliance Program		
Information Technology			
	Practice Management System		
	Electronic Health Records (EHR)		
	Hardware/Software/Internet Access		
	General Accounting Software (AP, GL, and Payroll)		
	Telehealth		
Human Resources			
	Staffing Levels		
	Job Descriptions		
	Set Salaries		
	Set Benefits		
	Personnel Policies		
	Mandated Background Checks:		
	<ul style="list-style-type: none"> ▪ State Sex Offender Registry 		
	<ul style="list-style-type: none"> ▪ National Sex Offender Registry 		
	<ul style="list-style-type: none"> ▪ State Abuse Registry 		
	<ul style="list-style-type: none"> ▪ OIG Exclusion List 		

Action Item	Responsible Person	Comments
Forms:		
<ul style="list-style-type: none"> ▪ Application 		
<ul style="list-style-type: none"> ▪ Tax 		
<ul style="list-style-type: none"> ▪ I-9 Employment Verification 		
<ul style="list-style-type: none"> ▪ Insurance Applications 		
<ul style="list-style-type: none"> ▪ Retirement 		
<ul style="list-style-type: none"> ▪ Confidentiality Agreement 		
Personnel Files		
Hire Staff		
Train Staff		
Medicare/TennCare (Medicaid)/Managed Care		
Credentialing Applications		
Contracts		
Medicare:		
<ul style="list-style-type: none"> ▪ Provider Number 		
<ul style="list-style-type: none"> ▪ NPI 		
<ul style="list-style-type: none"> ▪ Participation Agreement 		
Referral and Precertification Policies and Forms		
Laboratory/Radiology		
CLIA Number		
Reference Lab:		
<ul style="list-style-type: none"> ▪ Managed Care Relationships 		
<ul style="list-style-type: none"> ▪ Forms 		
<ul style="list-style-type: none"> ▪ Supplies 		
<ul style="list-style-type: none"> ▪ Logs 		
<ul style="list-style-type: none"> ▪ Pickup Schedule 		
<ul style="list-style-type: none"> ▪ Reporting System 		

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Action Item		Responsible Person	Comments
	Equipment		
	Signage		
	Licenses		
	Inspections		
Billing			
	Billing Outsourced vs. In-house		
	Billing and Collection Policies		
	Encounter Forms - if needed		
	Fee Schedule		
	CMS 1500 Forms		
	Collection Agency		
	Internal Financial Controls		
	Front Desk Change Fund		
Supplies			
	Medical		
	Laboratory		
	Radiology		
	Office Supplies		
	Break Room		
	Cleaning		
Reception			
	Waiting Room:		
	<ul style="list-style-type: none"> ▪ Accessibility 		
	<ul style="list-style-type: none"> ▪ Security 		
	<ul style="list-style-type: none"> ▪ Cleanliness 		

Action Item	Responsible Person	Comments
Signs:		
<ul style="list-style-type: none"> ▪ Notice of Privacy Practices 		
<ul style="list-style-type: none"> ▪ Copy of Provider License(s) 		
<ul style="list-style-type: none"> ▪ Non-Discrimination Notice Poster 		
Additional Forms/Printing		
Appointment Cards		
Business Cards		
Letterhead and Envelopes		
Patient Information Forms and Brochures:		
<ul style="list-style-type: none"> Include Patient Financial Policies 		
<ul style="list-style-type: none"> Registration Forms 		
<ul style="list-style-type: none"> Patient Instructions 		
<ul style="list-style-type: none"> Prescription Pads 		
<ul style="list-style-type: none"> Referral Forms 		
<ul style="list-style-type: none"> Return to Work/School Forms 		
<ul style="list-style-type: none"> Records Release Forms 		
Subscriptions & Publications		
Coding Books		
Medical Dictionaries		
PDRs		
Medical Reference Books		
Professional Journals		
Magazines		

Action Item	Responsible Person	Comments
Marketing		
Develop Plan		
Announcement		
Referring Physicians		
Advertising		
Community Relations		
Website		
Social Media		